

Jump-Start Your Move to Automated Quality Management: 7 Proven Steps

You know the drill: hours spent hunting for calls, listening, and scoring a sliver of interactions, with little time left to coach. Automated, AI-powered QM changes that, yet many teams hesitate to make the move. Seven practical steps, plus Verint tools that do the heavy lifting, can get you there in weeks, not months.

Nobody loves manual quality management (QM). Talented analysts spend their days searching for interactions and listening to calls, yet score just 1% to 3% of them, while supervisors wait days for evaluations they can coach on. So why aren't QM teams clamoring to automate? It's rarely doubt about the value. More often, the change itself feels intimidating:

- **"Will AI replace me?"** No. AI takes over the searching, listening, and scoring. You stay in charge of calibration, coaching, disputes, and the judgment calls that make quality meaningful.
- **"I'm not an AI expert."** You don't need to be. There's no coding: you write questions in plain language, and every score shows the AI reasoning and evidence behind it.
- **"Where do I even start?"** With dozens of forms and questions, it's hard to know. That's why we've broken the transition into seven manageable steps, each designed to answer a question you'll want settled before you scale.

7 Steps from Manual to Automated QM

You don't have to pause or rebuild your current program. Each step is small enough to complete while your existing process keeps running.

Step 1: Map your current QM process. List every evaluation form, question, and scoring criterion, and document the pain points: hours lost to finding calls, inconsistent scoring between reviewers, compliance gaps, and blind spots. Then ask the question: what problem are we really solving? Coverage, consistency, time to coaching, or compliance? You can't automate a process you haven't written down.

Step 2: Define success and prioritize. Decide what success looks like beyond saving time: more interactions scored, faster feedback to agents, fewer disputes, more hours spent coaching. Then ask analysts, supervisors, and the compliance team what they need help with most. Where their answers overlap is your starting point.

Step 3: Start small with forms you know. Don't build a new form. Convert an existing one and automate a handful of questions, beginning with rules-based items such as greetings, identity verification, and required disclosures before moving to sentiment or empathy. Check your data, too: are the interactions you want to score recorded and transcribed, and are your questions worded clearly enough to return a consistent answer?

Step 4: Activate autoscoring on a pilot scope. Choose one team, channel, or interaction type: narrow enough to review the output in detail, wide enough that the results are representative.

Step 5: Test and calibrate. Run manual and AI scoring in parallel on the same sample. Investigate every disagreement, review the AI reasoning behind each score, and refine question wording until the results hold up. This is where your expertise matters most, and where trust in the program is earned.

Step 6: Set up automated workflows. Turn on the alerts, reporting, coaching assignments, and dispute handling that follow the score, so results lead to action instead of sitting in a report. Then decide where people stay in the loop: reviewing flagged interactions, resolving disputes, and coaching agents.

Step 7: Bring people along, then scale. Before expanding, make sure agents, supervisors, and analysts understand how automated scores are generated and how they'll be used. Then add questions, forms, and teams in phases so confidence grows with coverage, and keep refining as business needs evolve.



Executive Perspective

How Verint Makes the Switch Easier

The hardest part of the transition isn't the scoring. It's getting your forms and questions converted and building your team's confidence. Verint® QM Intelligence™ includes tools purpose-built to do exactly that:

- **Pre-built question library.** Start with proven, ready-made contact center evaluation questions instead of a blank page, then add or adapt your own.
- **Automated Form Converter.** Turn the manual forms you've spent years refining into automated ones, so your quality standard carries over instead of being rebuilt.
- **Automated Form Validator.** Test questions against real interactions, see how the AI scores and why, adjust as needed to ensure accuracy - all before going live. Eliminate the publish-wait-revise cycle.
- **Explainable AI built for the contact center.** Every score links to AI reasoning and the moment in the interaction that supports it, so you can trust it, coach on it, and defend it.
- **QM expertise and support.** Verint quality experts guide you through each step, from mapping your forms to calibrating your first pilot.

Together, these capabilities enable businesses to deploy QM Intelligence in weeks, not months.

Ready to spend less time searching and scoring, and more time coaching? See how [Verint QM Intelligence](#) can help.

Want to discover all the ways Verint can help automate your quality program? Check out [The Complete Buyer's Guide to Automated Quality Management](#) at [verint.com](#).



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